

X-Data for Salesforce CPQ

Sales Quoting in Excel

Whether you're in Sales, Marketing, Operations, or one of the many other departments that use Salesforce, chances are that Microsoft® Excel is also an application you use and depend on. Model N's X-Data for Salesforce CPQ is an Excel-based solution that enables Salesforce CPQ users to access and manage their quote data entirely within Excel. X-Data for Salesforce CPQ is an easy-to-use solution designed to help busy Sales professionals increase their productivity throughout the sales quoting lifecycle. X-Data for Salesforce CPQ provides Excel templates that enable users to quickly and securely extract, analyze, and update their Salesforce quotes with a few simple steps.

Drive Sales Productivity

Salesforce CPQ was built with both end-users and administrators ease-of-use in mind. With X-Data for Salesforce CPQ, usability and productivity are taken to the next level by allowing your sales reps to manage their quotes directly from Excel. Whether they're on the airplane or on the train, sales reps will love the convenience of being able to create and update quotes, even while offline. They can also quickly and easily view a profit analysis of their quotes to ensure their deals are meeting margin guidelines. Administrators can create and deploy new Excel-based quote templates to global sales team in just minutes, making changes to quoting processes faster and easier to adopt.

QUOTE DETAILS										
Quote ID	Account	Opportunity	Contact	Price Segment	Price Date	Status	Version #	Expiration Date		
120089	Burlington Design	New Servers for Burlington	Jennifer McNamee	Manufacturing	6/14/2016	Draft	1.00	7/31/2016		
QUOTE LINES										
Line #	Product ID	Product	Billing Frequency	List Price	Quantity	Discount	Unit Price	Extended Price	Unit Cost	
11	1 BU700569	Eclipse Backup for Business up to 200TB	One Time	\$ 138.56	1.00	90.54	\$ 15.00	\$ 15.00	\$ 87.21	
12	2 BU700566	Eclipse Backup for Business unlimited Computers	Monthly	\$ 235.90	1.00	56.00	\$ 63.77	\$ 63.77	\$ 128.95	
13	3 225-4500	PowerEclipse X300	One Time	\$ 6,500.00	1.00	-	\$ 6,500.00	\$ 6,500.00	\$ 2,000.00	
14	4 D5CMBBundle	Centralized Mgmt & Reporting	Yearly	\$ 975.00	1.00	10.00	\$ 877.50	\$ 877.50	\$ 350.00	
15	5 900405	Windows Server 2012, Enterprise	One Time	\$ 4,441.88	1.00	-	\$ 4,441.88	\$ 4,441.88	\$ 2,441.03	
16	6 900410A	CAL for Windows: 1-10 Licenses	Monthly	\$ 93.75	30.00	-	\$ 93.75	\$ 937.50	\$ 51.56	
17	7 900419	iDRAC7 Enterprise for Blades	One Time	\$ 748.13	1.00	-	\$ 748.13	\$ 748.13	\$ 411.47	
18	8 900429	Basic Hardware Warranty Repair: 3x10 HW-Only, 5x10 NBD Onsite	Yearly	\$ 149.50	1.00	8.84	\$ 136.28	\$ 136.28	\$ 20.61	
19	9 900511	Protosupport and NBD On-site Service (year-to-year renewal)	Yearly	\$ 205.38	1.00	8.84	\$ 188.09	\$ 188.09	\$ 205.12	
20	10 900425	vSphere Enterprise v5.x	Yearly	\$ 7,816.88	1.00	8.84	\$ 7,125.75	\$ 7,125.75	\$ 4,299.28	
21	11 225-4500	PowerEclipse X300	One Time	\$ 6,500.00	1.00	-	\$ 6,500.00	\$ 6,500.00	\$ 2,000.00	
22	12 D5CMBBundle	Centralized Mgmt & Reporting	Yearly	\$ 975.00	1.00	10.00	\$ 877.50	\$ 877.50	\$ 350.00	
23	13 900405	Windows Server 2012, Enterprise	One Time	\$ 4,441.88	1.00	-	\$ 4,441.88	\$ 4,441.88	\$ 2,441.03	
24	14 900410A	CAL for Windows: 1-10 Licenses	Monthly	\$ 93.75	30.00	-	\$ 93.75	\$ 937.50	\$ 51.56	
25	15 900410B	CAL for Windows: 11-50 Licenses	Monthly	\$ 90.00	30.00	-	\$ 90.00	\$ 2,700.00	\$ 49.50	
QUOTE SUBLINES										
Main Line #	Parent Product	Product	Billing Frequency	List Price	Quantity	Discount	Unit Price	Extended Price	Unit Cost	
31	2 Eclipse Backup for Business unlim	Business Backup Dashboard and Analytics			6.00	-				
32	2 Eclipse Backup for Business unlim	Business Centralized Management Console			2.00	-				
33	2 Eclipse Backup for Business unlim	Introduction session to Business Backup Service			1.00	-				
34	2 Eclipse Backup for Business unlim	Business Automatic Cloud Backup Control Center			4.00	-				
35	2 Eclipse Backup for Business unlim	Business Backup Computers: Unlimited			1.00	-				
36	3 PowerEclipse X300	Single Processor	One Time	\$ 200.00	1.00	-	\$ 200.00	\$ 200.00	\$ 110.00	

Update quotes in X-Data in Excel

Features

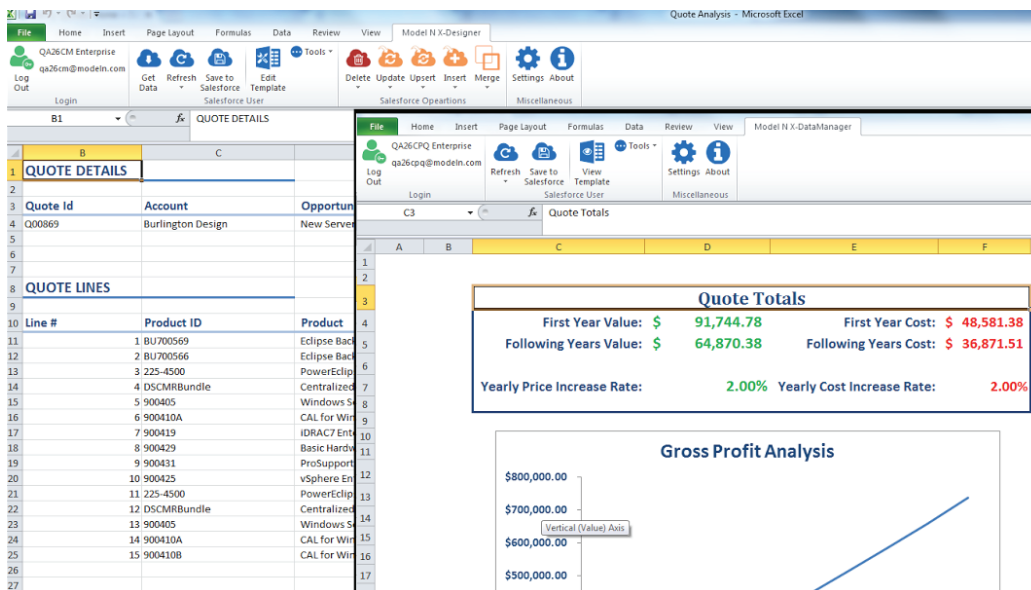
- X-Data toolbar in Excel
- X-Designer template builder
- Out-of-the-box templates
- Centralized template management
- Automated update logging

Benefits

- Analyze quote data more effectively using Excel
- Migrate and mass update data faster and more easily
- Increase administrator and user productivity
- Increase user adoption

Manage Any Salesforce Data in Excel

Excel is one of the most widely used business tools ever created. With X-Data for Salesforce CPQ, you can connect Excel to any Salesforce object and automate many administrative and end-user tasks with the click of a button. X-Data for Salesforce CPQ makes managing any Salesforce data faster and easier than ever. For example, use X-Data for Salesforce CPQ to extract, analyze, and modify your leads, accounts, contacts, opportunities, and quotes en masse. For administrators, X-Data for Salesforce CPQ is also a great tool for data migration, making it possible to bi-directionally transfer large data sets between Excel and any Salesforce object.



Create and modify templates in X-Designer in Excel

Key Capabilities

- Extract, update, upload and merge records
- Map multiple objects per Excel worksheet
- Create dynamic lookups from Excel to Salesforce
- Create new templates and configure UI to access them

For more information about Model N X-Data for Salesforce CPQ, [click here](#).

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